Market Survey of the

Poultry International

PROCESSOR Audience

Geographic Analysis of:

- Species Processed, Further Processed, By Processing Capacity
- Further Processed Items Made
- Processing Operations; Needing Most Improvement
- Equipment Recently Bought
- Expansion Plans
- Other Information

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POULTRY INTERNATIONAL PROCESSOR SURVEY

Purpose of Survey

The purpose of this 1988 survey was to measure - exclusively and in more depth than in the past - the Eastern Hemisphere's poultry processing industry as represented by the processor and further processor circulation of Poultry International.

SURVEY METHOD

Sample Design: The survey "universe" comprised 1,979 names on the February 25 1988 Poultry International BPA qualified circulation list of poultry processors and poultry further processors arranged in country number sequence. The approximate geographic break-out was: Europe - 708; Middle East and Africa - 703; and Asia and Pacific - 568. We drew every nth name from this circulation list to yield some 1,000 names and addresses. For purposes of this survey, the region designated as "Middle East and Africa" comprises the 16 Asian countries of Afghanistan, Bahrain, Cyprus, Iran, Iraq, Israel, Jordan, Kuwait, Oman, Pakistan, Qatar, Saudi Arabia, Syria, Turkey, United Arab Emirates, and Yemen, plus all of Africa; while "Asia and Pacific" includes the Asian mainland (except the Middle East) and islands of the Pacific Ocean.

Sample Size:

	Combined Areas	Europe	Middle East And Africa	Asia and Pacific
Number in mailing sample.....	993	355	353	285
Number of usable returns.....	447	170	144	133
Number of unusable returns....	11	4	4	3
Number of returns.....	458	174	148	136
Percent response.....	46.1%	49.0%	41.9%	47.7%

Respondents replied without a tangible incentive, and, instead, furnished their own international airmail postage.

Questionnaire Design: The questionnaire was designed mainly to obtain the information felt most needed by the Poultry International staff. The order, arrangement, and wording of the questions were guided by generally accepted mail survey technique.

Mailing Procedure: Computer-printed control cards containing the survey sample names and other information were numbered consecutively. Each questionnaire mailed was also numbered to match the number assigned the recipient on the control card.

The first mailing went out on March 23 1988.

A follow-up questionnaire was mailed on May 9th, to all non-respondents.

Tabulation and Report Writing: The survey returns were tabulated by Analytical Computer Service Inc., Chicago, and the Watt Publishing Co. Research Section which wrote this report.

Poultry International Processor Survey

HIGHLIGHTS

1. Among Poultry International subscribers who reported at survey time (around April-May 1988) that their companies process and/or further process poultry, 95% processed while the 56% that further processed ranged from 40% in the Middle East/Africa region to 72% in Europe. Among those who did not further process, about six out of every ten planned to start in the subsequent two years.

2. Of the poultry processors, (1) 95% (up from 88% earlier reported for 1985) process **broilers**, with an average capacity of 4,900 broilers per hour - up from 2,300; and (2) 23% (up from 11%) can process 1,300 **turkeys** per hour - ranging from 400 in the Middle East and Africa to 1,500 in Europe. Of the poultry **further** processors, 90% have a **broiler** further processing capacity of 2,000 broilers per hour, 31% have a **turkey** further processing capacity of 600 turkeys per hour, and 21% have a **culled layer** further processing capacity of 1,100 culled layers per hour.

3. During the preceding three years as many as 74% of the processors bought processing plant equipment - ranging from 63% in Middle East/Africa to 89% in Europe. The type bought by the largest percent - 52% - of these buyers was Chilling or Freezing equipment - ranging from 46% in Europe to 62% in Asia/Pacific, followed by Eviscerating equipment - 46% (ranging from 35% in Middle East/Africa to 54% in Europe), Packaging equipment - 45%, and Cutting-up - 44% (ranging from 29% in Middle East/Africa to 51% in Europe).

(MORE)

4. In answer to the question "Which of the following changes in the poultry processing facilities of this plant do you expect in the next two years?" (a) as many as 55% of the processors said Expect to **modernize** existing processing equipment - ranging from 47% in Middle East/Africa to 65% in Europe, followed by Expect to (b) add **additional** processing equipment - 52%, (c) expand existing processing plant area - 36%, and (d) build **new** processing plant - 22%.

5. Items furnished by a large majority of processors to their plant personnel include Uniforms - furnished by 90%, Boots - furnished by 86%, Gloves - furnished by 82%, and Aprons - 74% - ranging from 66% in Middle East/Africa to 83% in Asia/Pacific.

6. Among poultry processing plant personnel who influence the **purchase** of plant equipment and/or supplies, an average of about 40% do **not** regularly see salespeople of these items.

7. Among actions taken as a result of seeing advertisements in Poultry International in 1987, fully 54% of the processors Requested more information, and 26% of all processors **Bought** the **advertised** product/service - ranging from 18% in Europe to 34% in Asia/Pacific.

8. As many as 46% of all the processors visited a poultry industry exhibition outside their country in the preceding two years - ranging from 28% in Asia/Pacific to 69% in Europe.

1. "Do you or your company do any poultry processing (slaughtering/eviscerating) or **further** processing (beyond cutting up)?"

	Combined Areas	Europe	Middle East And Africa	Asia* And Pacific
Respondents..	442	169	149	124
Percent of survey respondents who answered "Yes"...	90%	94%	91%	82%

"If you **do** process or further process poultry ..."

(a) "Are you a poultry processor, or a further processor?"

Respondents..	374	153	128	93
Percent of processors** reporting:				
Poultry processor only.....	44%	28%	60%	46%
Poultry **further** processor only....	4%	5%	4%	3%
Do both types of processing.....	52%	67%	36%	51%

(b) "If you do not **further** process, do you plan to start in the next two years?"

Respondents..	106	26	54	26
Among processors who do not further process, percent who answered "Yes".....	59%	62%	57%	62%

*The heading "Asia" throughout this report refers to Asia excluding the Middle East.

**For purposes of this survey report unless otherwise specified, "processors" refers to poultry processors and/or poultry further processors.

2. "Which type(s) (species) of poultry does your company process and/or further process?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	364	143	129	92
Poultry Processed				
Percent of processors reporting:				
Broilers.....	95%	92%	98%	97%
Turkeys.....	23%	38%	16%	10%
Culled Layers..	34%	33%	31%	38%
Ducks.....	13%	18%	9%	12%
Geese.....	7%	14%	4%	2%
Guinea Fowl....	4%	6%	3%	1%
Quail.....	4%	2%	5%	3%
Other.....	5%	4%	5%	5%
Poultry **Further** Processed				
Respondents..	205	106	46	53
Percent of further processors reporting:				
Broilers.....	90%	87%	93%	94%
Turkeys.....	31%	49%	11%	11%
Culled Layers..	21%	21%	22%	21%
Ducks.....	10%	12%	-	15%
Geese.....	3%	6%	2%	-
Guinea Fowl...	2%	3%	-	2%
Quail.....	2%	3%	-	2%
Other.....	6%	5%	4%	11%

(a) "If you process any of the species listed below, approximately how many can you process per **hour**?"

Broilers Processed **Per Hour**				
Respondents..	312	128	105	79
Percent of broiler processors reporting:				
10,000 or more.....	12%	16%	11%	8%
5,000 - 9,999.....	26%	33%	17%	24%
2,000 - 4,999.....	36%	36%	31%	43%
Under 2,000	26%	15%	41%	25%
Average* number of broilers per hour per processor.....	4,900	6,300	4,200	3,800
Median number of broilers per hour per processor.....	3,900	4,600	2,500	3,000

*Arithmetic average.

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Turkeys Processed Per Hour				
Respondents..	69	50	14*	5**
Percent of turkey processors reporting:				
2,000 or more.....	23%	26%	14%	20%
1,000 - 1,999.....	31%	42%	-	-
200 - 999.....	23%	18%	36%	40%
Under 200 ..	23%	14%	50%	40%
Average number of turkeys per hour per processor.....	1,300	1,500	400	850
Median number of turkeys per hour per processor.....	1,000	1,100	150	200

*Percentages and averages of this base should be viewed with more than usual caution.

**Percentages and averages of this base are not projectable.

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Culled Layers Processed Per Hour				
Respondents..	79	39	20	20
Percent of culled layer processors reporting:				
4,000 or more	14%	15%	15%	10%
2,000 - 3,999	32%	44%	15%	25%
500 - 1,999	34%	31%	35%	40%
Under 500	20%	10%	35%	25%
Average number of culled layers per hour per processor.....	1,900	2,200	1,600	1,500
Median number of culled layers per hour per processor.....	1,550	2,000	150	560

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Ducks Processed Per Hour				
Respondents..	35	20	10*	5**
Percent of duck processors reporting:				
3,000 or more	17%	25%	-	-
1,000 - 2,999	37%	55%	20%	20%
200 - 999	20%	15%	20%	40%
Under 200	26%	5%	60%	40%
Average number of ducks per hour per processor.....	1,200	1,600	500	600
Median number of ducks per hour per processor.....	1,000	1,350	100	200

*Percentages and averages of this base should be viewed with more than usual caution.

**Percentages and averages of this base are not projectable.

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Broilers Further Processed Per Hour				
Respondents..	134	65	31	38
Percent of broiler further processors reporting:				
5,000 or more.....	13%	20%	3%	11%
2,000 - 4,999.....	26%	32%	23%	18%
1,000 - 1,999.....	27%	28%	29%	24%
500 - 999	15%	8%	13%	29%
Under 500.....	19%	12%	32%	18%
Average number of broilers per hour per further processor.	2,000	2,600	1,500	1,800
Median number of broilers per hour per further processor.	1,000	2,000	1,000	1,000

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Turkeys Further Processed Per Hour				
Respondents..	39	35		
Percent of turkey further processors reporting:				
2,000 or more.....	5%	3%		
1,000 - 1,999.....	28%	31%		
200 - 999 turkeys..	46%	49%		
Under 200.....	21%	17%		
Average number of turkeys per hour per further processor.....	600	600		
Median number of turkeys per hour per further processor...	500	500		

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Culled Layers Further Processed Per Hour				
Respondents..	23	15*		
Percent of culled layer further processors reporting:				
3,000 or more ...	13%	13%		
1,000 - 2,999 ...	39%	54%		
300 - 999.....	22%	20%		
Under 300	26%	13%		
Average number of culled layers per hour per further processor..	1,100	1,400		
Median number of culled layers per hour per further processor..	1,000	1,000		

*Percentages and averages of this base should be viewed with more than usual caution.

3. "If this is a broiler or turkey processing or further processing plant, what processing is done here?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	370	147	126	97
Percent of processors reporting:				
Slaughtering.....	96%	97%	93%	98%
Eviscerating.....	84%	95%	71%	84%
Cutting up.....	79%	83%	70%	86%
Grinding.....	23%	31%	19%	18%
Smoking.....	15%	24%	7%	9%
Breading.....	26%	35%	19%	23%
Filleting.....	44%	61%	24%	43%
Chilling or freezing...	72%	75%	70%	71%
Canning.....	4%	7%	3%	1%
Packaging.....	71%	77%	63%	71%
Deboning.....	46%	60%	22%	56%
Other.....	8%	10%	4%	8%

4. "If this plant **cuts up** broilers or turkeys, does it use fully automatic in-line equipment to cut whole broilers o turkeys into a set number of parts in a single operation?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	340	129	118	93
Among processors who cut up broilers or turkeys, percent answering:				
Yes..	27%	33%	22%	25%
No...	73%	67%	78%	75%

(a) "If 'no,' what method(s) do you use?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	239	82	90	67
Among processors who cut up broilers or turkeys but do not use fully automatic in-line equipment, percent reporting:				
Saw-cut only.....	15%	9%	19%	18%
Knife-cut only....	49%	[illegible]%	56%	49%
Use both methods..	42%	[illegible]%	33%	37%
Other.....	3%	7%	1%	1%

5. "If you do further processing at this plant, which of the following further processed items do you make?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	247	111	73	63
Percent of further processors reporting:				
Fried chicken or turkey (breaded, individually quick frozen, parts, etc.)	50%	48%	47%	59%
Ground poultry meat	37%	44%	38%	24%
Deboned meat (for others to further process)	60%	69%	44%	63%
Pies	6%	9%	4%	3%
Entrees (kiev, cordon bleu, etc.)	18%	31%	7%	10%
Roasts (raw, cooked, sliced, etc.)	33%	41%	30%	22%
Rolls (raw, cooked, sliced, etc.)	26%	41%	15%	11%
Lunch meat (bologna, ham, salami, pastrami, etc.)	23%	31%	19%	16%
Turkey or chicken frankfurters	20%	27%	18%	10%
Chicken or turkey nuggets	26%	35%	16%	21%
Chicken burgers	32%	37%	29%	29%
Breasts (whole, fillet, strips, etc.)	65%	78%	47%	62%
Flavor injected chicken/turkey	19%	25%	11%	19%
Smoked chicken/turkey	22%	34%	10%	16%
Other	10%	10%	12%	8%

6. "What operations of your poultry processing plant do you feel need the most improvement?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	344	135	120	89
Percent of processors reporting:				
Live bird handling	45%	41%	43%	55%
Slaughtering	26%	22%	29%	28%
Eviscerating	29%	30%	29%	27%
Cutting up	32%	36%	30%	29%
Deboning	31%	40%	23%	27%
Chilling or freezing	32%	27%	34%	37%
Packaging	35%	36%	39%	26%
Further processing	35%	45%	28%	30%
Warehousing and/or shipping	17%	18%	11%	26%
Other	4%	5%	4%	3%

7. "Which one of your poultry processing areas are you likely to further mechanize or automate next?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	333	134	113	86
Percent of processors reporting:				
Live bird handling	38%	34%	39%	45%
Slaughtering	21%	19%	24%	20%
Eviscerating	23%	25%	21%	22%
Cutting up	33%	34%	30%	36%
Deboning	31%	40%	21%	31%
Chilling or freezing	20%	21%	22%	16%
Packaging	36%	37%	41%	28%
Further processing	32%	40%	21%	34%
Warehousing and/or shipping	16%	15%	10%	26%
Other	4%	4%	4%	2%

8. "Was any processing, further processing, refrigeration, and/or packaging **equipment** bought for this poultry processing plant in the last three years?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	359	143	122	94
Percent of processors answering "Yes"	74%	89%	63%	66%

(a) "If 'yes,' which type(s) of equipment did you buy?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	263	127	75	61
Among processors who bought any processing plant equipment, percent reporting:				
Live bird handling	30%	33%	25%	31%
Slaughtering	40%	44%	27%	46%
Eviscerating	46%	54%	35%	44%
Cutting up	44%	51%	29%	49%
Deboning	26%	34%	11%	30%
Chilling or freezing	52%	46%	55%	62%
Packaging	45%	46%	44%	44%
Further processing	32%	41%	20%	28%
Warehousing and/or shipping	17%	20%	12%	18%
Other	7%	4%	12%	8%

9. "Which of the following changes in the poultry processing facilities of this plant do you expect in the next two years?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	365	144	126	95
Percent of processors reporting:				
Expect to . . .				
Build new processing plant.....	22%	19%	27%	20%
Expand existing processing plant area.....	36%	42%	30%	36%
Add additional processing equipment.....	52%	58%	46%	48%
Modernize existing processing equipment....	55%	65%	47%	53%
Other.....	5%	5%	4%	6%
None.....	8%	2%	14%	11%

10. "How many shifts (work turns) does this poultry processing plant have now?"

Respondents..	370	145	128	97
Percent of processors reporting:				
One.....	62%	63%	63%	57%
Two.....	31%	32%	29%	33%
Three...	6%	4%	6%	9%
Other...	1%	1%	2%	1%

11. ITEMS FURNISHED BY PROCESSORS TO PLANT PERSONNEL

Respondents..	378	151	129	98
Percent of processors reporting:				
Uniforms.....	90%	95%	87%	86%
Gloves.....	82%	90%	78%	74%
Boots.....	86%	88%	83%	88%
Aprons.....	74%	76%	66%	83%
Other, written-in:				
Caps, hats.....	10%	9%	7%	14%
Hair nets.....	2%	4%	-	1%
Masks.....	2%	3%	-	2%
Warm clothing.....	1%	1%	2%	1%
Shoes, waterproof clogs	1%	1%	1%	1%
Meal, food.....	1%	1%	-	-
Knives.....	1%	-	1%	1%
Miscellaneous (mentioned once each).....	2%	2%	2%	1%
(Any).....	(98%)	(99%)	(98%)	(98%)

12. "How many total people in your poultry plant have an **influence** on the selection or purchase of this plant's processing, further processing, packaging, and shipping equipment or supplies?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	291	125	96	70
Percent of processors reporting:				
10 or more people..	28%	23%	32%	33%
5 - 9 people.....	25%	34%	19%	20%
3 or 4 people.....	33%	32%	32%	34%
1 or 2 people.....	14%	11%	17%	13%
Median number of poultry plant personnel who have an **influence** on the purchase of plant equipment and/or supplies, per plant.....	5	5	5	5

(a) "How many of these people (included in your answer to question 12) **see salespeople** of these processing plant items regularly?"

Respondents..	272	120	93	59
Percent of processors reporting:				
10 or more people..	14%	15%	13%	13%
5 - 9 people.....	15%	21%	9%	12%
3 or 4 people.....	29%	26%	31%	34%
1 or 2 people.....	42%	38%	47%	41%
Among processing plant personnel who influence the purchase of plant equipment and/or supplies, the median number who **see salespeople** of these items regularly, per plant.....	3	3	3	3
Percent of people with buying influence who do **NOT** see salespeople regularly.....	40%	40%	40%	40%

13. "What is your own title or chief job responsibility?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	375	147	130	98
General administration				
President, general manager, owner, vice president, manager, controller, chief executive officer, V.P. finance, etc.....	41%	37%	45%	40%
Operations management				
Plant manager or superintendent, V.P. operations, processing plant manager, complex manager, quality assurance manager, purchasing agent, feed mill manager, etc..	32%	40%	27%	28%
Veterinary/technological service.....	14%	14%	15%	14%
Marketing and sales				
Sales manager, sales, sales rep., national sales manager, market director, V.P. sales, etc.....	4%	5%	1%	6%
Other.....	9%	4%	12%	12%

14. "About how much time do you spend in reading and referring to an average issue of Poultry International?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	412	158	143	111
Percent of processors reporting:				
About three hours or more.....	16%	10%	22%	14%
About two hours.....	18%	12%	19%	25%
About one hour.....	37%	35%	41%	35%
About half an hour.....	22%	34%	11%	20%
Less than half an hour.	7%	9%	7%	6%

15. "Which Poultry International subjects or departments do you usually read?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	414	160	142	112
Percent of processors reporting:				
Breeding.....	57%	53%	58%	62%
Chick or poultry hatchery management.....	53%	46%	59%	55%
Nutrition.....	61%	58%	62%	64%
Feeding.....	64%	53%	68%	73%
Disease.....	66%	57%	70%	74%
Housing.....	55%	48%	56%	63%
Poultry farm equipment..	57%	49%	63%	60%
Waste disposal.....	35%	28%	32%	49%
Poultry processing.....	74%	83%	71%	64%
Poultry marketing.....	62%	66%	54%	64%
Egg processing.....	27%	19%	30%	35%
Egg marketing.....	29%	18%	32%	42%
"In Our View".....	36%	41%	33%	31%
"Country Overviews".....	46%	43%	46%	51%
"Products, People and Companies".....	56%	51%	58%	61%
"Coming Events".....	44%	38%	51%	45%
Other.....	7%	8%	7%	7%

16. "Articles in Poultry International are usually . . ."

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	407	157	140	110
Percent of processors reporting:				
Easy to read.....	80%	82%	83%	74%
Difficult to read....	8%	10%	4%	9%
Timely and pertinent.	41%	40%	38%	45%
Dated, not relevant..	4%	4%	4%	2%
Practical.....	70%	75%	67%	65%
Not practical.....	2%	3%	3%	2%
Technical enough.....	66%	64%	63%	74%
Not technical enough.	13%	15%	15%	5%

17. "As a result of seeing advertisements in Poultry International in 1987, which of the following have you done?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	386	148	134	104
Percent of processors reporting:				
Bought advertised product/service.....	26%	18%	30%	34%
Saw a salesman/ representative.....	18%	20%	21%	13%
Requested more information.....	54%	48%	59%	55%
Filed ad for future reference.....	39%	31%	40%	49%
Clipped and routed advertisement to others.....	30%	31%	29%	29%
(Any of the above)....	(84%)	(85%)	(88%)	(78%)

18. "What is generally done with your copy of Poultry International after you have finished reading it?"

Respondents..	419	159	143	117
Percent of processors reporting:				
File for future reference.....	69%	55%	82%	74%
Clip items of interest..	25%	19%	27%	30%
Pass along to others....	47%	50%	43%	46%
Photocopy items for others.....	31%	35%	29%	28%
Discard.....	5%	9%	5%	2%

19. "Which of the following poultry-related magazines do you receive regularly?"

Respondents..	416	159	143	114
Percent of processors reporting:				
Broiler Industry.....	30%	38%	24%	25%
Poultry International..	88%	91%	87%	87%
Poultry (Misset).....	18%	24%	16%	11%
Turkey World.....	16%	28%	12%	4%
World Poultry.....	49%	54%	46%	44%
Zootecnica International.....	11%	13%	12%	9%

20. "Did you visit any poultry industry exhibitions (fairs) **outside** your country in the last two years?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	407	156	137	114
Percent of processors answering "Yes".....	46%	69%	34%	28%

(a) "If 'yes,' which foreign fairs?"

Respondents..	186	108	47	31
Percent of processors reporting:				
EXPOAVIGA, Barcelona Spain..	11%	18%	2%	3%
Fiera di Verona, Verona Italy.....	14%	17%	15%	3%
Huhn & Schwein, Hannover West Germany.....	53%	61%	47%	32%
Salon International d'Aviculture, Paris France.....	14%	19%	6%	6%
SIMAVIP, Paris France.....	12%	15%	11%	3%
Southeastern International Trade Show, Atlanta, GA (USA).....	30%	25%	36%	35%
VIV Asia, Tokyo Japan.....	8%	3%	4%	29%
VIV, Utrecht Netherlands.....	40%	50%	34%	16%
Other, written-in:				
ANUGA.....	3%	5%	-	-
European Poultry Fair.....	1%	1%	2%	-
Miscellaneous (mentioned once each)....	10%	5%	19%	13%

21. "Do you usually read any of the non-English article **summaries** found near the back of each issue of Poultry International?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	412	158	140	114
Percent of processors answering "Yes".....	34%	43%	32%	23%

(a) "If 'yes,' in which language(s)?"

Respondents..	138	68	44	26
'yes'-answering processors reporting:				
French.....	28%	32%	30%	12%
German.....	25%	46%	9%	-
Italian.....	9%	16%	-	4%
Spanish.....	17%	28%	5%	8%
Japanese.....	7%	1%	2%	27%
Chinese.....	13%	3%	2%	58%
Arabic.....	25%	4%	70%	4%

22. "Do you receive Poultry International's once-a-year directory issued in September titled 'WHO'S WHO INTERNATIONAL In The Egg And Poultry Industries'?"

	Combined Areas	Europe	Middle East And Africa	Asia And Pacific
Respondents..	408	156	139	113
Percent of processors answering "Yes".....	77%	78%	79%	74%

(a) "If 'yes,' which one of the following statements best describes how often you refer to WHO'S WHO INTERNATIONAL during a year?"

Respondents..	305	116	107	82
Among WWI processor recipients, percent reporting:				
More than once a week.....	3%	2%	5%	4%
About once a week, on the average.	5%	3%	4%	9%
About twice a month, on the average.	12%	9%	19%	7%
Several times a year.....	50%	56%	50%	40%
Only when I first receive it (once a year).....	30%	29%	22%	40%